Helpful Training Details

What's in those Folders?
Report templates found in folders under **Collection Analysis.**

Library Administration
    All Activity Measures
    (useful for measuring activity in Workflows or iBistro)
Technical Services
    Acquisitions, Authority, Cataloging, and Serials Stats
    (useful for tracking employee activity & collection details)
Public Services
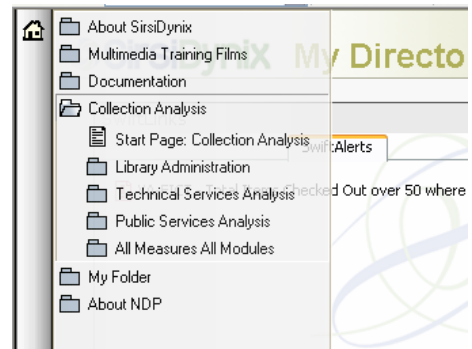   Bills & Fines, Circulation, Holds, Reserves, User Info
    (useful for all that is circulation—you will use these most often)
All Measures
    A huge list of everything, all variables
    (useful as templates if you do not like what is in the other folders)

HELP, I Need Somebody, Help!

Multimedia Training Films
    Top-notch training videos with audio!
Documentation
    Extra training docs, MSC PowerPoints, Support Staff email addresses.
Help Files
    Select the **?** on the Popout Menu for context-sensitive help- more files coming soon!
SwiftHelp
    Located on the Dashboard, SwiftHelp can be accessed by clicking on the topic title.

Make it Look Good: Refine Your List Titles in Excel

View your list in Excel. Adjust the columns and font size for best viewing. The column containing the Item ID needs to be formatted to show up correctly.

The formatting needs to be adjusted to "Number" with 0 decimal places.
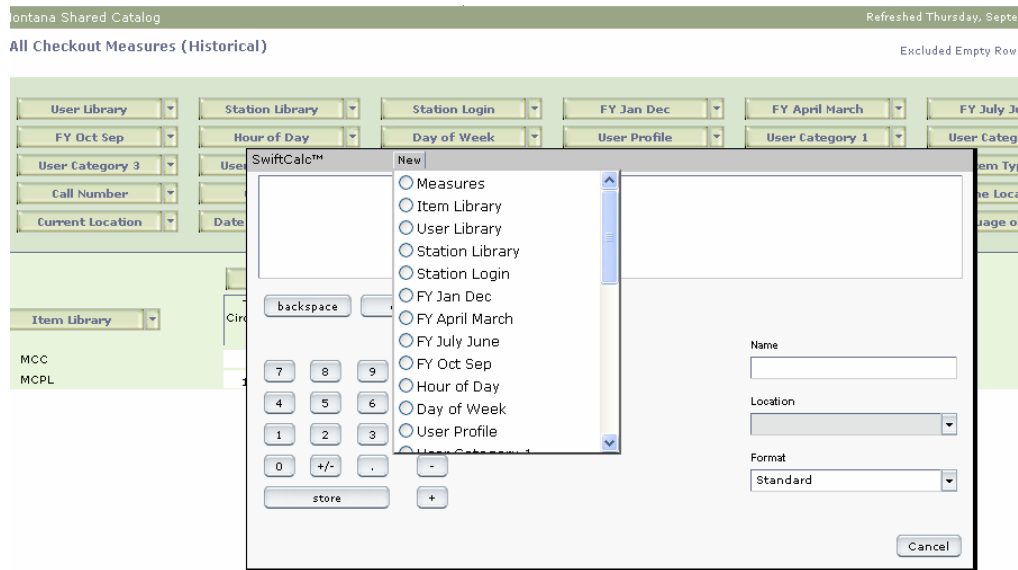
In the Estimated Fine column, adjust the formatting to "Accounting" with 2 decimal places.

Adjust your page orientation for best printing. To clean up the final printed report, delete columns containing unnecessary information.
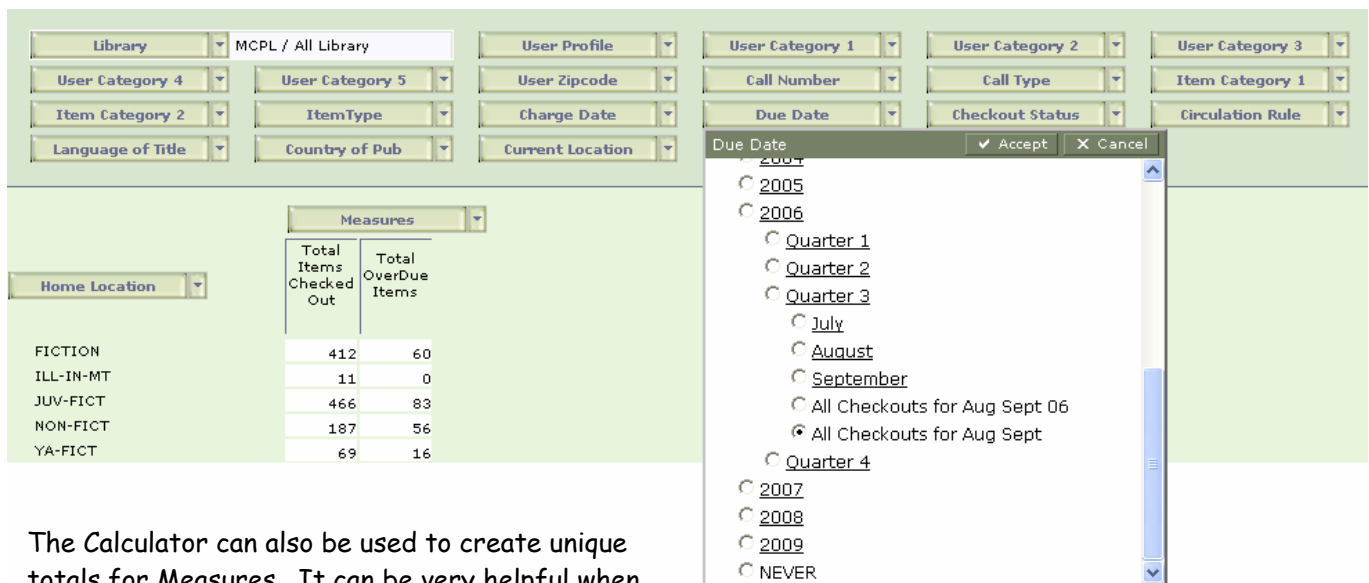
Pushing Buttons: How to Use the Calculator

The calculator option can be used to generate totals for selected data options.

Click on **New**, select the Dimension you want to create a specific calc total for. Example: **New**, **Due Date**, select the dates you want to include separating each one with a plus or minus sign**, Name** this calculation, click on **Save**.

Find your new calculation in the Dimension pool under the applicable Dimension. In this case, **Due Date**. Select your calc and click **Accept**.

The Calculator can also be used to create unique totals for Measures. It can be very helpful when doing State Statistics, i.e. combining all Audio Item types for one total.
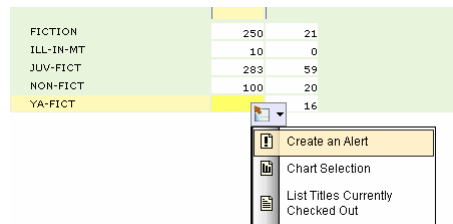
Alert Me When Something Good Happens: Creating Alerts

Setup the Director's Station to Alert you when certain criteria (set by you) is reached. Alerts are a great way to be notified of circulation milestones.

Generate a report, highlight the area you wish to create an Alert on (the same way you highlight stats to be used in a Title List, or making a Chart). The drop down menu appears, select Create an Alert.
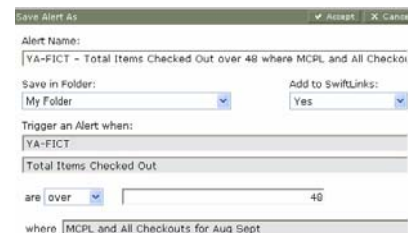
In the screen that appears, set your Alert parameters. Director's Station will alert you when these parameters have been reached. Be sure to name this Alert so you know what it is.   **Alerts can only be created for a single cell in a report. **

Alerts are displayed on your Dashboard in the SwiftLinks area. In order for an Alert to be displayed there you must save it in both My Folder and SwiftLinks.

FICTION	250	21
ILL-IN-MT	10	0
JUV-FICT	283	59
NON-FICT	100	20
YA-FICT		16

Create an Alert
Chart Selection
List Titles Currently Checked Out

Save Alert As   ✔ Accept | X Cancel
Alert Name:
YA-FICT - Total Items Checked Out over 48 where MCPL and All Checkou
Save in Folder: Add to SwiftLinks:
My Folder   Yes
Trigger an Alert when:
YA-FICT
Total Items Checked Out
are over   48
where MCPL and All Checkouts for Aug Sept
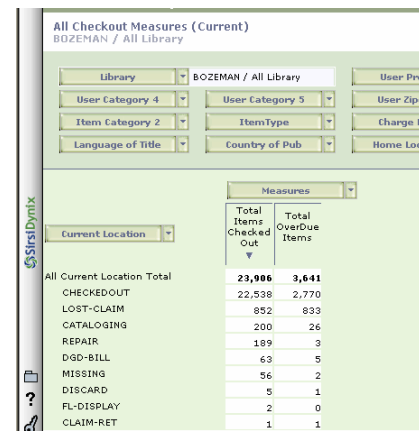
Nudge, Nudge, Here's a Few Hints

For ILL:
Use User Profile and User Category 1 settings to create cards to check out ILLs to. Then use your DS to track out-going ILL stats for the fiscal year- the State Library can help you with these settings. When creating brief titles for your in-coming ILLs, use the Home Locations for ILL (in state, out of state) to track your stats.

For Lost Reports, Assumed Lost:
To generate a list of titles currently on the Lost or Assumed Lost list, run an All Catalog Measures report, swap out Library and Current Location, click on the cell and List titles. Export the list to Excel for easy viewing.

Current Goings on:
Run an All Checkout Measures Current report, move User Profile back to the pool, swap out Current Location with Library, narrow to your library in the above pool, expand All Current Location by clicking on the underlined words in the report. A full list of checked out things, missing things, repairs, lost, etc. The diagram at the right shows the breakdown of the Bozeman Public Library.

All Checkout Measures (Current)
BOZEMAN / All Library

Library	BOZEMAN / All Library	User Pro
User Category 4	User Category 5	User Zipc
Item Category 2	ItemType	Charge D
Language of Title	Country of Pub	Home Loc

Measures

	Total Items Checked Out ▼	Total OverDue Items
Current Location		
All Current Location Total	23,906	3,641
CHECKEDOUT	22,538	2,770
LOST-CLAIM	852	833
CATALOGING	200	26
REPAIR	189	3
DGD-BILL	63	5
MISSING	56	2
DISCARD	5	1
FL-DISPLAY	2	0
CLAIM-RET	1	1

For Overdue Items:

Director's Station does not replace the overdue notices, but you can create a report that shows you which books are currently Overdue, and when they were checked out and due. Run a Bills and Fines/All Checkout Measures Current report, swap out User Profile with Library, narrow your library in the pool above, expand the All User Profile below by clicking on the underlined words. Click in the cell with the overdue items you want listed, and List Titles. Note, this list will show both overdue and non-overdue items, but they are clearly labeled as such.

Bills and Fines:

Display money owed, money paid, waived, forgiven by running a Bills and Fines report, narrow down to your library in the above pool. You can then click on the individual cells to display bills or payments. The diagram below is the fines and bills for Polson.

Montana Shared Catalog — Refreshed Wednesday, February 21, 2007

All Bill Measures
POLSON / All Library — Excluded Empty Rows and Columns

Library	POLSON / All Library	Payment Date	ItemType	Call Number	Call Type
Item Category 1	Item Category 2	Bill Reason	User Category 1	User Category 2	User Category 3
User Category 4	User Category 5	User Profile	Item Price	Date Billed	Birth Year

Measures

Payment Type	Number of Bills	Total Amount Billed	Payment Amounts	Delinquent Patrons	Blocked Patrons	Barred Patrons
All Payment Type Total	10,289	22,971.12	6,052.12	1,348	401	0
CANCEL			1,469.11			
CASH			3,781.03			
CHECK			557.75			
FORGIVEN			184.60			
WAIVED			59.63			

Holds and Such:

Watch as your holds move off and on the holds shelf, what books are still unavailable, which ones are on their way, and more using the Holds Report. Run a All Hold Measures report, narrow to your library in the pool above (pickup library), expand the All User Profile by clicking on the underlined words. The diagram below is for Flathead County WF.

All Hold Measures
FCL-WF / All Library — Excluded Empty Rows and Columns

Pickup Library	FCL-WF / All Library	Hold Created Date	Hold Date Expires	Inactive Reason	Call Number
Call Type	Availability Status	Hold Status	Item Library	ItemType	Hold Placed Library
Item Category 1	Item Category 2	User Category 1	User Category 2	User Category 3	User Category 4
User Category 5	User Zipcode	Language of Title	Country of Pub		

Measures

User Profile	Number of Holds
All User Profile Total	1,039
FCLG-ADU	871
FCLG-GROUP	3
FCLG-JUV	140
FCLG-STAFF	19
FCLG-TEMP	6

By clicking on the individual cells, you can list the holds and availability status- gives a handy little snapshot of your holds picture, especially if you are a member of the Partners, 3Rivers, or another resource sharing entity.